

Understanding Load Profiles

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Why load profiles?

- ◆ Suit different requirements
- ◆ Optimize workflows
- ◆ Implement local cataloging practices
- ◆ Work with new vendors
- ◆ Work with new record types



How They Work

Take data from
incoming
MARC records



Profile tells
system what to
do with that
information



Records added to
catalog according
to rules set by
profile



EDITING FILE: m2btab.database

^N > NEW line ^O > Toggle overwrite/INSERT ^E > END
^U > UNDELETE line ^W > Diacritics coded/DISPLAYED
^D > DELETE line ^B > Begin BLOCK
^X > DELETE char

#for loading New Gale Database records

```
|||0|0| | |0|n|G|0|@main="b"  
|||0|0| | |0|n|G|0|@marc="bi"  
|||0|0| | |0|n|G|0|@atab="a"  
|||0|0| | |0|n|G|0|@msg="Bib records will be created"  
/^999||m|0|12| | |0|n|G|0|#com="ins"@password=""  
/^999||z|0|10| | |0|n|G|0|#com="recs"@recs="database"  
/^999||x|0|1| | |0|n|G|0|#com="clsi"@clsi="n"  
/^999||w|0|1| | |0|n|N|0|#com="test"@test="n"  
/^999||v|0|1| | |0|n|N|0|#com="init"@init="n"  
/^999||u|0|1| | |0|n|N|0|#com="disp"@disp="n"  
/^999||s|0|30| | |0|n|G|0|#com="ip"@itemprefix=""  
/^999||o|0|20| | |0|n|G|0|#com="dflt"@dflt="biblio,item"  
/^999||t|0|10| | |0|n|G|0|#com="ov"@ov_tag="o[ov_245]"  
|||0|0| | |0|n|G|0|@ov_action="p"  
|||0|0| | |0|n|G|0|@ov_protect="b=V023456789hk(970,971)y(856)F28,30"  
|||0|0| | |0|n|G|0|@holdsymb=""  
#|||0|0| | |0|n|G|0|@pre_map="m2bpre_map."
```

What We Can Do

- ◆ Move information
- ◆ Add custom fields
- ◆ Omit fields and subfields
- ◆ Change or remove text



Regular Expressions

Find patterns of numbers, letters or symbols

- `[a-z]` = any letter
- `[0-9]` = any digits
- `{2}` = Preceding characters repeated the specified number of times

Example:

Match on date format YYYY/MM/DD

`[0-9]{4}/[0-9]{2}/[0-9]{2}`



What We Can Do

Protect information:

- ◆ Retain specific fields after overlay
(keep original info)

Example:

Keep the *Material Type* from the brief record



What We CAN'T Do

- ◆ Prevent overlay if Cat Date exists
- ◆ Conditionally load data
- ◆ Delete record when match is found



12 Elements

To create profiles, we use a code made up of 12 elements

1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12

Each part is separated from the next by the pipe symbol



Element 1: MARC Tag

Number of the field you want to work with

```
600-699 | | -w | 0 | 0 | b | d | 0 | y | N | 0 |  
700-720 | | -w | 0 | 0 | b | b | 0 | y | N | 0 |  
730-740 | | -w | 0 | 0 | b | u | 0 | y | N | 0 |  
752-755 | | + | 0 | 0 | b | y | 0 | y | N | 0 |  
760-777 | | + | 0 | 0 | b | w | 0 | y | N | 0 |  
780 | | + | 0 | 0 | b | x | 0 | y | N | 0 |  
785 | | + | 0 | 0 | b | z | 0 | y | N | 0 |
```

- ◆ Allows for a range of MARC tags
- ◆ Use indicators to get more specific



Element 2: New MARC Tag

- ◆ Load entire MARC tag as a different number

Example:

Load 240 fields as 730 fields

- ◆ Create a new field

Example:

Insert custom note field



Element 3: Subfields

- ◆ Include all subfields as they are with ' + '
- ◆ Specify certain subfields you want to include
Ex: Putting ' a ' here would load only \$a
- ◆ Exclude specific subfields by preceding them with ' - '
Ex: ' -h ' on a 245 field would load everything except the GMD
- ◆ Specify order of subfields by separating with " : "
Ex: ' z:u ' would load \$z before \$u even if arranged differently in the incoming record
- ◆ Load a subfield as a different subfield with ' > '
Ex: ' p>b ' would load any instances of \$p as \$b instead



Element 4: Offset

Used mostly with special fields, like Leader or 008

Example:

Country code is located 15 characters into the 008 field

008 _ _ 140620s2014 **ilua** j b 001 0 eng



Element 5: Number Of Bytes

When specifying an offset, include number of bytes to load (otherwise, set to 0 to include the entire field)

Example:

Country code has up to 3 letters, so number of bytes would be 3

008 _ _ 140620s2014 **ilua** j b 001 0 eng



Element 6: Record Type

The type of record that will be affected

- ◆ **b** : Bibliographic
- ◆ **i** : Item
- ◆ **o** : Order
- ◆ **c** : Holdings/check-in
- ◆ **a** : Authority
- ◆ **p** : Patron



Element 7: Variable Length Field

Specifies which label to assign to each field

EDITION	250
PUBLISHER	260
DESCRIPT	300

Example:

240s were labeled as "Title" fields, but after changing this element, we can label them as an "Additional Title" instead



Element 8: Fixed Length Field

- ◆ Tells the system when a fixed length field is going to be affected
 - If element 7 is used, element 8 will be 0.
 - Likewise, if this field is used, element 7 will be blank



Elements 9, 10 & 11

- ◆ 9 – MARC format
- ◆ 10 – Permanence
- ◆ 11 – Pass number



Element 12: Special

This is the fun stuff ...

- ◆ Control overlay triggers
- ◆ Auto-format fields
- ◆ Replace text



Overlay - @ov_tag

- ◆ Controls overlay based on particular field (must be indexed variable length field)
- ◆ Confirmation test on title field

Example:

Overlay if there is a match on ISBN, but only if the title field also matches



Overlay - @idx

- ◆ Overlay based on record number
- ◆ Export batch of records, make edits externally, then re-import
- ◆ Avoid overlaying wrong record or creating new one



Overlay - @ov_protect

Protects specified fields from being overlaid

- ◆ Fixed length fields – use number
- ◆ Variable length fields - use field group tag
(can specify further by combining with MARC tags)

Options:

- ◆ Keep field from original record only, ignore incoming data for field
- ◆ Keep existing field only if not in new record, otherwise overlay
- ◆ Keep existing field AND add the new one



Overlay - @ov_action

- ◆ If zero matches are found:
 - INSERT new record or
 - REJECT record
- ◆ If one match is found:
 - OVERLAY matching record or
 - ATTACH linked records
- ◆ If multiple matches are found:
 - INSERT new record or
 - REJECT record or
 - ATTACH linked record to the first match



Auto-Formatting

- ◆ @speriod - strip periods from the end of fields
- ◆ %bracket - add brackets around GMD
- ◆ %strip_blanks - control removal of leading blank spaces



Replace Function

Find and replace certain words or patterns of text

Example:

Original -

Note

Availability of back issues from 2001- varies by institution.

New -

Note

Availability of back issues from 2017-



Replace - Translation Tables

```
EDITING FILE: m2bmap.skipdigit
^E > END          ^F > Show FULL

@case=true
@delimiter=!
@stop_on_map=true
245..|aThe (.*)$0!24514|aThe \0
245..|aAn (.*)$0!24513|aAn \0
245..|aA (.*)$0!24512|aA \0
```



Record Templates

BIBLIOGRAPHIC template: _b: Bibliographic default

File Edit View Tools Help

Insert Save Print Prompt Close

MAT TYPE
LANG

Move Up
Move Down

LANG	eng English	CAT DATE	- -	SUPPRESS	-
SKIP	0	BIB LVL	m MONOGRAPH	COUNTRY	us United States
LOCATION	none	MAT TYPE	b Book		

- ◆ Fill in missing info
- ◆ Attach dummy records



Other Possibilities

- ◆ **@m2b_normalize_020** - Normalize ISBN by ignoring spaces, dashes, and other characters
- ◆ Select one instance of multiple MARC tags
 - **%first** - selects first occurrence
 - **%last** - selects last occurrence
- ◆ **@cdate** - option to set CatDate as today's date



Questions?

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